

STIC Database Tracking Number: 309758

**To: Examiner Ella COLBERT**  
**Location: KNX4A21**  
**Art Unit: 3696**  
**Date: 09/25/2009**  
**Case Serial Number: 09/240456**

**From: Matthew Hogan**  
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## Search Notes

Dear Examiner COLBERT:

Please find attached the results of your search for the above-referenced related cases. The search was conducted in Dialog, in EBSCOhost (mandatory I & PC Abstract databases) and in ProQuest (Financial Times database), as well as online and in the LEXIS system. All mandatory databases for allowance were searched.

I have listed *potential* references of interest for either or both cases in the opening section of these search results. However, please be sure to review the entire report. There may be additional references that you find useful.

Please note that the results, after the potential references of interest, proceed through an Inventor search (which is provided without regard to priority date and in **GREEN TEXT**) and then to results in both Abstract and Full Text databases (which are more directly screened for priority date).

If you have any questions about the search, or need a refocus, please do not hesitate to contact me.

Thank you for using the EIC, and we look forward to your next search!

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I. Potential References of Interest

*\* EIC-Searcher identified “potential references of interest” are selected based on the terms/concepts provided in the examiner’s search request.*

{NONE SELECTED}

## II. Inventor Search

### A. Dialog

File 347:JPIO Dec 1976-2009/Jun(Updated 090923)

(c) 2009 JPIO & JPIO

File 348:EUROPEAN PATENTS 1978-200939

(c) 2009 European Patent Office

File 349:PCT FULLTEXT 1979-2009/UB=20090917/UT=20090910

(c) 2009 WIPO/Thomson

File 350:Derwent WPIX 1963-2009/UD=200960

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Set Items Description

S1 88 AU=(LUNDBERG, S? OR LUNDBERG S?)

S2 29 S1 AND TRADEMARK?

S3 21 S2 AND (LAW OR LAW FIRM OR LEGAL OR ATTORNEY?)

S4 12 S3 AND (FEE? ? OR PAYMENT?)

S5 12 IDPAT (sorted in duplicate/non-duplicate order)

S6 12 IDPAT (primary/non-duplicate records only)

File 15:ABI/Inform(P) 1971-2009/Sep 24

(c) 2009 ProQuest InfoLearning

File 9:Business & Industry(R) Jul/1994-2009/Sep 24

(c) 2009 Gale/Cengage

File 610:Business Wire 1999-2009/Sep 25

(c) 2009 Business Wire.

File 610:Business Wire 1986-1999/Feb 28

(c) 1999 Business Wire

File 278:Gale Group Computer DB(TM) 1983-2009/Aug 26

(c) 2009 Gale/Cengage

File 624:McGraw-Hill Publications 1985-2009/Sep 25

(c) 2009 McGraw-Hill Co. Inc

File 621:Gale Group New Prod. Annou.(R) 1995-2009/Aug 18

(c) 2009 Gale/Cengage

File 636:Gale Group Newsletter DB(TM) 1987-2009/Sep 01

(c) 2009 Gale/Cengage

File 613:PR Newswire 1999-2009/Sep 25

(c) 2009 PR Newswire Association Inc

File 613:PR Newswire 1987-1999/Apr 30

(c) 1999 PF Newswire Association Inc  
 File 16:Gale Group PROMT(F) 1990-2009/Sep 01  
 (c) 2009 Gale/Cengage  
 File 160:Gale Group PROMT(F) 1972-1989  
 (c) 1999 The Gale Group  
 File 634:San Jose Mercury Jan 1985-2009/Sep 20  
 (c) 2009 San Jose Mercury News  
 File 148:Gale Group Trade & Industry DB 1976-2009/Sep 08  
 (c) 2009 Gale/Cengage  
 File 20:Dialog Global Reporter 1997-2009/Sep 25  
 (c) 2009 Dialog  
 File 35:Dissertation Abs Online 1861-2009/Aug  
 (c) 2009 ProQuest Info&Learning  
 File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13  
 (c) 2009 Gale/Cengage  
 File 65:Inside Conferences 1993-2009/Sep 25  
 (c) 2009 ELDSC all rts. reserv.  
 File 2:INSPEC 1998-2009/Sep W3  
 (c) 2009 The IET  
 File 474:New York Times Abs 1965-2009/Sep 25  
 (c) 2009 The New York Times  
 File 475:Wall Street Journal Abs 1973-2009/Sep 25  
 (c) 2009 The New York Times  
 File 99:Wilson Appl. Sci & Tech Abs 1983-2009/Aug  
 (c) 2009 The HW Wilson Co.  
 File 256:Tectrends 1982-2009/Sep W3  
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# Set Items Description

S1 115 AU=(LUNDBERG.S? OR LUNDBERG S?)  
 S2 0 S1 AND ((TRADEMARK? OR PATENT?)(4N)(FEE? ? OR PAYMENT?))

3/3,K/1 (Item 1 from file: 350)  
 DIALOG(R)File 350: Derwent WPIX  
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 0017070888 *Drawing available*  
 WPI Acc no: 2007-785845/200773  
 XRPX Acc No: N2007-623219

**One-click docketing performing method for Internet based online patent and trademark application management system, involves initiating docketing process with input signal by pressing button e.g. executing one-click, on mouse**

Patent Assignee: LUNDBERG S W (LUND-I); SINHA P (SINH-I)

Inventor: LUNDBERG S W; SINHA P

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
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US 20070250364	A1	20071025	US 2006401164	A	20060410	200773	B
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Priority Applications (no., kind, date): US 2006401164 A 20060410

#### Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20070250364	A1	EN	12	5		

**One-click docketing performing method for Internet based online patent and trademark application management system, involves initiating docketing process with input signal by pressing button e.g. executing one-click, on mouse Alerting Abstract ... USE - Used for performing one-click docketing of a task in an Internet based online patent and trademark application management system for extracting data from a correspondence and filing of a document template using data by a patent agent and an attorney.... technique such as visual component library (VCL) in conjunction with an object oriented programming language, and is compiled together with the Internet based patent and trademark application management system for providing additional functionality to the system**Original Publication Data by AuthorityArgentina**Publication No.** Inventor name & address:**Lundberg, Steven W.**... **Original Abstracts:**The present invention includes an apparatus, method and system for one-click docketing of tasks in an internet based patent and trademark application management system. In some embodiments, a client computer is operatively coupled to an application server, which in turn is operatively coupled to a patent... **Claims:**1. A method comprising:initiating a docketing process with a single input signal wherein the docketing process is a part of an online patent and trademark application management system;retrieving case information data from a database;providing the case information data to a patent information server;retrieving patent information data based...

**Dialog eLink:** [Order File History](#)

3/3.K/2 (Item 2 from file: 350)

DIALOG(R)File 350: Derwent WPIX

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0016392271 *Drawing available*

WPI Acc no: 2007-108444/200711

Related WPI Acc No: 2007-749236

XRPX Acc No: N2007-076723

**Action e.g. office action, docketing and reporting method, involves entering event indicia into**

event field of docket software and identifying date into field for date input associated with event

Patent Assignee: FOUNDATIONIP LLC (FOUN-N)

Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 7142713	B1	20061128	US 2002279783	A	20021024	200711	B

Priority Applications (no., kind, date): US 2002279783 A 20021024

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 7142713	B1	EN	6	2		

**Alerting Abstract** ...USE - Used for docketing and reporting an action e.g. office action, notice of allowance and notice of missing part, corresponding with a trademark office, government agency, court, corporation and law firm... Original Publication Data by AuthorityArgentina**Publication No.** Inventor name & address:**Lundberg, Steven W**...**Original Abstracts:**a method for docketing an action or event, such as an action or event defined in a form received from the United States Patent and Trademark Office. The method includes scanning the form having written information thereon, the written information comprising a date and indicia defining a docket event, to obtain...

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3/3,K/3 (Item 3 from file: 350)

DIALOG(R)File 350: Derwent WPIX

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0016264715 *Drawing available*

WPI Acc no: 2006-796339/200681

XRFX Acc No: N2006-615487

**Intellectual property data management method for professional services information management system, involves accepting time entry associated with legal matter, through data entry screen for user to select item**

Patent Assignee: BRENNAN T F (BREN-F); JAIN S (JAIN-F); KALIS J (KALI-F); LUNDBERG S W

(LUND-B); SINHA P (SINH-I)

Inventor: BRENNAN T F; JAIN S; KALIS J; LUNDBERG S W; SINHA P

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20060230113	A1	20061012	US 200585626	A	20050321	200681	B

Priority Applications (no., kind, date): US 200585626 A 20050321

Patent Details

Patent Number	Kind	Law	Pgs	Draw	Filing Notes
US 20060230113	A1	EN	35	15	

**Intellectual property data management method for professional services information management system, involves accepting time entry associated with legal matter, through data entry screen for user to select item Alerting Abstract ...NOVELTY - A message is received in an intellectual property management system from a mail handling system for associating the message automatically with a legal matter represented in the intellectual property management system. A time entry associated with the legal matter is accepted through a data entry screen for a user to select a item from a user selectable item displayed with the message. ... computer implemented legal services data processing system; patent application data management system; computer implemented method for intellectual property data management; and computer readable medium storing instructions to perform... .. DESCRIPTION OF DRAWINGS - The figure shows a web page from an internet-based patent and trademark management system.**Title Terms** .../Index Terms/Additional Words: **LEGAL**; **Class Codes** Original Publication Data by AuthorityArgentina**Publication No.** Inventor name & address:Lundberg, Steven W...  
...**Original Abstracts**:message from an electronic mail handling system wherein a message is received in an intellectual property management system, and automatically associating the message with a legal matter represented in the intellectual property management system. Further there is displayed a user selectable item with the message when it is displayed to a... .. brings a user to a data entry screen that accepts a time entry, and further also where the time entry is automatically associated with the legal matter in which the message is associated. In addition, the system and method provides for organizing intellectual property data according to activities related to intellectual... .. each activity is represented by an activity data structure containing at least some data pertinent to the activity, and wherein the activity data structure associates legal billing data associated with the activity. The system and method also provides for adding a legal services billing entry to an activity data structure using a user selectable item displayed while data associated with the activity data structure is displayed to... ..**Claims**:receiving a message from a mail handling system wherein the message is received in an intellectual property management system;automatically associating the message with a legal matter represented in the intellectual property management system; anddisplaying a user selectable item with the message when it**



is displayed to a user, wherein... operation, wherein the data operation includes displaying a data entry screen to accept a time entry, wherein the time entry is automatically associated with the **legal** matter in which the message is associated.

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3/3.K/4 (Item 4 from file: 350)

DIALOG(R)File 350: Derwent WPIX

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0016213196 *Drawing available*

WPI Acc no: 2006-744839/200676

KRPX Acc No: N2006-578313

**Patent and trademark application managing method, involves designing electronic documents as subject to technical data export control restrictions, and controlling access to documents based on user's right to view documents**

Patent Assignee: BRENNAN T F (BREN-I); JAIN S (JAIN-I); KALIS J M (KALI-I); LUNDBERG S W (LUND-I); SINHA P (SINH-I)

Inventor: BRENNAN T F; JAIN S; KALIS J M; LUNDBERG S W; SINHA P

Patent Family (1 patents, 1 countries)

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20060212402	A1	20060921	US 200585815	A	20050321	200676	B

Priority Applications (no., kind, date): US 200585815 A 20050321

**Patent Details**

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
US 20060212402	A1	EN	22	15		

**Patent and trademark application managing method, involves designing electronic documents as subject to technical data export control restrictions, and controlling access to documents based on user's right...** Alerting Abstract... storing and processing information in a data storage and processing system. A set of electronic documents is stored on the system that is associated with **legal** matters. The electronic documents are designated as subject to technical data export control restrictions. An access to the designated documents is controlled based on a... USE - Used for managing patent and **trademark**

application... ..method controls access to the designated documents based on the user's right to view the export controlled documents, thus efficiently managing the patent and **trademark** application in a cost-effective manner... ..DESCRIPTION OF DRAWINGS - The drawing shows a web page from an Internet-based patent and **trademark** management system. Original Publication Data by Authority: Argentina Publication No. Inventor name & address: **Lundberg, Steven W.** ...Original Abstracts: information in a data storage and processing system accessed wherein there is stored a plurality of electronic documents on the system that are associated with **legal** matters, wherein at least some of the documents contain technical data, and wherein one more electronic documents as subject to technical data export control restrictions... **Claims:** 1. A method comprising: storing and processing information in a data storage and processing system accessed by **attorneys** or **legal** support staff using the system, wherein the information pertains to a plurality of **legal** matters being handled by the **attorneys**, and wherein the **legal** matters are for respective clients; storing a plurality of electronic documents on the system that are associated with **legal** matters, wherein at least some of the documents contain technical data; designating one more electronic documents as subject to technical data export control restrictions and...

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3/3.K/5 (Item 5 from file: 350)

DIALOG(R)File 350: Derwent WPLX

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0016126803 *Drawing available*

WPI Acc no: 2006-658433/200668

XXPX Acc No: N2006-527554

**Legal service data processing method for management of e.g. intellectual property information, involves deciding whether to make electronic mail messages as public message and storing copy of message in public folder**

Patent Assignee: BRENNAN T F (BRENNAN T F); JAIN S (JAIN S); KALIS J M (KALIS J M); LUNDBERG S W (LUNDBERG S W); SINHA P (SINHA P)

Inventor: BRENNAN T F; JAIN S; KALIS J M; LUNDBERG S W; SINHA P

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20060190541	A1	20060824	US 200561312	A	20050218	200668	B

Priority Applications (no., kind, date): US 200561312 A 20050218

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing	
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					Notes	
US 20060190541	A1	EN	23	15		

**Legal service data processing method for management of e.g. intellectual property information, involves deciding whether to make electronic mail messages as public message and storing...**

**Alerting Abstract** ...**NOVELTY** - The method involves storing the electronic mail (e-mail) messages in association with the respective **legal** matters tracked by the system. The message is stored in the data management system in a private folder accessible by a group of users. A... **DESCRIPTION** - An **INDEPENDENT CLAIM** is included for computerized **legal** service data processing system... **USE** - For management of intellectual property information, **legal** information and patent and **trademark** application... **DESCRIPTION OF DRAWINGS** - The figure shows the flowchart explaining **legal** service data processing method. **Title Terms** /Index Terms/Additional Words: **LEGAL**; **Class Codes** Original Publication Data by Authority:Argentina**Publication No.**, Inventor name & address:**Lundberg, Steven W.** **Original Abstracts**:There is disclosed method and apparatus for storing and processing information in a data storage and processing system used by **attorneys**, wherein there is sent an electronic message from the processing system to one or more e-mail recipients. An electronic message is received in the... to receive the electronic message. Individuals specified to receive a message are allowed to view the message, and the message is in association with respective **legal** matters tracked by the system. Individuals not specified to receive a message are allowed to view a message if the message is designated available to... than the recipients. Further, a user not specified to receive a message viewing the message in connection with viewing data being tracked for a particular **legal** matter. **Claims**:1. A method comprising:storing and processing information in a data storage and processing system used by **attorneys**;sending an electronic message from the processing system to one or more e-mail recipients;receiving an electronic message in the processing system from an... of individuals to receive the electronic message;allowing individuals specified to receive a message to view the message;storing the messages in association with respective **legal** matters tracked by the system; andallowing individuals not specified to receive a message to view a message if the message is designated available to...

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3/3.K/6 (Item 6 from file: 350)  
DIALOG(R)File 350: Derwent WPIX  
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0016126772 *Drawing available*  
WPI Acc no: 2006-658402/200668  
XRPX Acc No: N2006-527523

**Intellectual property information management method involves designating attorney-client communications with indication of automatic identification so as to purge upon request by user**

Patent Assignee: BRENNAN T F (BREN-T); JAIN S (JAIN-D); KALIS J M (KALI-I); LUNDBERG S W (LUND-I); SINHA P (SINH-I)

Inventor: BRENNAN T F; JAIN S; KALIS J M; LUNDBERG S W; SINHA P

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20060190495	A1	20060824	US 200561385	A	20050218	200668	B

Priority Applications (no., kind, date): US 200561385 A 20050218

Patent Details

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
US 20060190495	A1	EN	23	15		

**Intellectual property information management method involves designating attorney-client communications with indication of automatic identification so as to purge upon request by user**  
**Original Titles:**System and method for purging messages in a legal information system **Alerting Abstract** ...NOVELTY - The method involves storing and processing the information in a data storage and processing system used by attorneys, and recording attorney-client communications and communications from a government agency respecting a legal matter. The attorney-client communications are designated with an indication that allows the communications to be identified automatically. The attorney-client communications are automatically identified and purged upon a request by a user. ...USE - For management of intellectual property information, legal information, and patent and trademark applications. ...ADVANTAGE - The messages in the legal information system are automatically purged effectively... Original Publication Data by AuthorityArgentina**Publication No.** Inventor name & address:Lundberg, Steven W... **Original Abstracts:**There is disclosed method and apparatus for storing and processing information in a data storage and processing system used by attorneys, and recording attorney-client communications and communications from a government agency respecting a legal matter. At least some of the attorney-client communications can be designated with a indication that allows them to be identified automatically. These communications can then be automatically identifying and purging at least some of the attorney-client communications upon a request by a user. **Claims:**1. A method comprising:storing and processing information in a data storage and processing system used by attorneys;recording attorney-client communications and communications from a government agency respecting a legal matter;designating at least some of the attorney-client communications with a indication that allows them to be identified automatically; andautomatically identifying and purging at least some of the attorney-client communications upon a request by a user.

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 3/3,K/7 (Item 7 from file: 350)  
 DIALOG(R)File 350: Derwent WPIX  
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0016126756 *Drawing available*  
 WPI Acc no: 2006-658386/200668  
 XRPX Acc No: N2006-527507

**Intellectual property information management method involves establishing search watch and associated with unique identifier and associating watch result with identifier with particular legal matter**

Patent Assignee: BRENNAN T F (BREN-I); JAIN S (JAIN-I); KALIS J M (KALI-I); LUNDBERG S W (LUND-I); SINHA P (SINH-I)

Inventor: BRENNAN T F; JAIN S; KALIS J M; LUNDBERG S W; SINHA P

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20060190471	A1	20060824	US 200561384	A	20050218	200668	B

Priority Applications (no., kind, date): US 200561384 A 20050218

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20060190471	A1	EN	22	15		

**Intellectual property information management method involves establishing search watch and associated with unique identifier and associating watch result with identifier with particular legal matter** Alerting Abstract ...watch result with the unique identifier is automatically sent from the accessed system (1420) to the main system (1410) and is associated with a particular legal matter given in the main system. ...USE - For management of intellectual property (IP) information of patent and trademark applications... **Title Terms** .../Index Terms/Additional Words: **LEGAL**; **Class Codes** Original Publication Data by AuthorityArgentina**Publication No.** Inventor name & address:**Lundberg, Steven W.**...**Original Abstracts:**the watch result includes the unique identifier. The watch results with the unique identifier are received in the first system and associated with a particular legal matter represented in the first system. The system and method further includes associating the watch result with a particular activity data structure for the legal matter. ...**Claims:**unique identifier; andreceiving the watch result with the unique identifier in the first data processing system and associating the watch

result with a particular **legal** matter represented in the first system, and further including associating the watch result with a particular activity data structure for the **legal** matter.

**Dialog eLink: Order File History**

3/3.K/8 (Item 8 from file: 350)

DIALOG(R)File 350: Derwent WPIX

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0015769237 *Drawing available*

WPI Acc no: 2006-330694/200634

XRPX Acc No: N2006-280280

**Secure web content scrapping method involves extracting scraping identifier from network content for searching contents from fields of scraping identifier and transmitting scraping network content request based on extracted identifier**

Patent Assignee: KALIS J M (KALI-I); LUNDBERG S W (LUND-I); SINHA P (SINH-I); YOUNG J D (YOUN-I)

Inventor: KALIS J M; LUNDBERG S W; SINHA P; YOUNG J D

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20060095377	A1	20060504	US 2004977539	A	20041029	200634	B

Priority Applications (no., kind, date): US 2004977539 A 20041029

**Patent Details**

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
US 20060095377	A1	EN	14	7		

**Alerting Abstract ... USE -** For scraping patent information from the united state patent and **trademark** office (USPTO) secure database or another patent database by patent **attorneys**, non-**attorneys** such as paralegals, administrative assistants, and support staff through internet... **ADVANTAGE -** The non-**attorneys** can easily access a USPTO customer's secure patent status information... Original Publication Data by AuthorityArgentina**Publication No.** ...Inventor name & address:**Lundberg, Steven W**

Dialog eLink: [Order File History](#)  
 3/3,K/9 (Item 9 from file: 350)  
 DIALOG(R)File 350: Derwent WPIX  
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0015512774 *Drawing available*  
 WPI Acc no: 2006-076917/200608  
 XRPX Acc No: N2006-066670

**Method for reimbursing law firm for out-of-pocket expense, involves determining actual carry period for expenses by calculating time from which expenses are incurred until by which reimbursement for expenses is received**

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)  
 Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20050289028	A1	20051229	US 2004577650	P	20040607	200608	B
			US 2005145818	A	20050606		

Priority Applications (no., kind, date): US 2004577650 P 20040607; US 2005145818 A 20050606

Patent Details

Patent Number	Kind	Law	Pgs	Draw	Filing Notes	
US 20050289028	A1	EN	6	1	Related to Provisional	US 2004577650

**Method for reimbursing law firm for out-of-pocket expense, involves determining actual carry period for expenses by calculating time from which expenses are incurred until by which reimbursement...** **Original Titles:** Method and apparatus for charging interest on law firm out-of-pocket expenses **Alerting Abstract DESCRIPTION** - An INDEPENDENT CLAIM is also included for system for reimbursing law firm... **...USE** - For reimbursing law firm for out-of-pocket expenses such as payment to expert, payment to government agencies e.g. patent and trademark office or regulatory agencies, payment to court for filing fees, payment for travel expense, payment to co-counsel e.g. foreign patent and trademark attorney, paid for client... **...ADVANTAGE** - Reimbursement is received ethically by the law firm without requiring prior agreement with client, since the law firm obtains reimbursement only for actual incurred cost... **...DESCRIPTION OF DRAWINGS** - The figure shows a block diagram of the system for reimbursing law firm... **...10 system for reimbursing law firm Title Terms** **.../Index Terms/Additional Words: LAW; Class Codes Original Publication Data by**

Authority: Argentina Publication No. Inventor name & address: Lundberg, Steven W... Original Abstracts: This application discloses method and system in which a party independent of the law firm contracts with the law firm to reimburse the law firm for interest costs incurred on out-of-pocket expenses paid by the law firm. In one embodiment, a law firm incurs an out-of-pocket expense for a client, and contemporaneously with incurring the expense, the independent party assesses a fee to the law firm for the particular out-of-pocket expense. The fee is assessed, in one embodiment, according to the amount of time the law firm is expected to carry the expense. The law firm bills the client for the expense and associated assessed fee as disbursements. The law firm receives payment by the client of the expense and the assessed fee, whereby the client reimburses the law firm for the expense and also reimburses the law firm for the assessed fee. The actual carry period for the expense is determined by calculating the time from the point the expenses were incurred/advanced by the firm until the time reimbursement for the expense was received. The assessed fee is paid to the independent party. The independent party pays the law firm an interest payment to reimburse the law firm for the actual cost of carrying the expense, such that the law firm is reimbursed only for an actual cost incurred in carrying the expense--the independent party reimburses the law firm for the interest cost incurred from the proceeds of the assessed fee. Claims: 1. A method, comprising: storing data regarding a plurality of law firm clients in a database; designating at least some of those clients to be billed for interest incurred financing out-of-pocket expenses; the law firm financing an out-of-pocket expense using law firm capital or a loan from a financing source; the law firm billing a client for a particular financed out-of-pocket expense; an independent party (independent of the law firm) billing the law firm a financing fee associated with the financed out-of-pocket expense; the law firm billing the client for at least a portion of the financing fee as a disbursement at the same time as billing the client for the associated out-of-pocket expense; the client paying the law firm for the financed out-of-pocket expense and for the financing fee disbursed to the client; determining how long the out-of-pocket expense was financed for based on when the law firm was paid by the client and when the out-of-pocket expense was incurred, and determining an actual financing cost incurred by the law firm as a result of financing the out-of-pocket cost for the client; and the independent party reimbursing the law firm for the actual financing cost incurred by the law firm using at least in part proceeds from the financing fee billed to the law firm.

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 3/3.K/10 (Item 10 from file: 350)  
 DIALOG(R)File 350; Derwent WPIX  
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0015191432 Drawing available  
 WPI Acc no: 2005-541025/200555  
 Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-079609  
 XRPX Acc No: N2005-443137

Fee payment method e.g. for government patent fees, involves arranging finance for clients so as to pay fees to government patent and trademark office, after determining separate charge including financing cost prior to transfer of funds



Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20050160036	A1	20050721	US 1997898377	A	19970722	200555	B
			US 200122153	A	20011214		
			US 200557405	A	20050211		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 200557405 A 20050211

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20050160036	A1	EN	47	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

**Fee payment method e.g. for government patent fees, involves arranging finance for clients so as to pay fees to government patent and trademark office, after determining separate charge including financing cost prior to transfer of funds** **Original Titles:**System and method for a law firm to incur separate charges in relation to handling out-of-pocket costs **Alerting Abstract ...NOVELTY -** The method involves arranging finance for clients so as to pay fees to government patent and trademark office, after determining separate charge that includes financing cost prior to the transfer of funds. **USE -** For payment of fees such as government patent and trademark fees... **Original Publication Data by Authority:**Argentina**Publication No.** Inventor name & address:**Lundberg, Steven W... Original Abstracts:**A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. **The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and trademark agency, or a foreign associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the fee, along with a ... firm for the fee and service charge is then sent to the separate organization to cover the firm's bill from the separate organization. A law firm maintains its own account and uses a second account funded with a loan to pay the out-of-pocket costs. According to one or more example embodiments of the inventive subject matter hereof, but not by limitation, there is provided method and apparatus providing for a law firm to arrange to pay a plurality of out-of-pocket costs for one or more clients, and the law firm incurring an obligation to pay a separate charge in relation to each respective**

out-of-pocket cost to at least in part cover a cost of financing the... **Claims:**1. A method comprising: a **law firm** arranging to **pay** a plurality of out-of-pocket costs for one or more clients; and the **law firm** incurring an **obligation** to pay a separate charge in relation to each respective out-of-pocket cost, wherein the separate charge at least in part covers a cost...

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3/3,K/11 (Item 11 from file: 350)

DIALOG(R)File 350: Derwent WPTX

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0014731988 *Drawing available*

WPI Acc no: 2005-079609/200509

Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-541025

XRFX Acc No: N2005-069974

**Method for payment of out-of-pocket costs in financial institution, involves billing separate charge for each law firm client, based on determined duration of time associated with financing out-of-pocket costs of respective clients**

Patent Assignee: LUNDBERG S (LUND-I)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040267558	A1	200411230	US 1997898377	A	19970722	200509	B
			US 200122153	A	20011214		
			US 2004710532	A	20040719		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710532 A 20040719

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20040267558	A1	EN	50	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

Method for payment of out-of-pocket costs in financial institution, involves billing separate charge for each law firm client, based on determined duration of time associated with financing out-of-pocket costs of respective clients **Alerting Abstract ...NOVELTY** - The method involves determining two different duration of time associated with financing an out-of-pocket cost for law firm clients. A separate charge is billed for each client, in relation to one or more respective out-of-pocket costs and based on duration.... method of associating law firm client with fee schedule; and apparatus for payment of out-of-pocket costs.... USE - For payment of out-of-pocket costs of law firm clients, such as patent and trademark fees, legal fees such as attorney and paralegal fees, postage charges and photocopying charges, in financial institution... **Title Terms** .../Index Terms/Additional Words: **LAW; Class Codes** Original Publication Data by Authority Argentina **Publication No.** Inventor name & address: **Lundberg, Steven...** **Original Abstracts:** A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and trademark agency, or a foreign associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the fee, along with a... firm for the fee and service charge is then sent to the separate organization to cover the firm's bill from the separate organization. A law firm maintains its own account and uses a second account funded with a loan to pay the out-of-pocket costs. According to one example embodiment of the inventive subject matter disclosed herein, there is disclosed a method and apparatus wherein a law firm client is associated with a first value, parameter, plan or schedule used to determine a charge to the client. The law firm bills the law firm client a separate charge in relation to one or more respective out-of-pocket costs, wherein each charge is based in part on the cost of processing or... **Claims:** 1. A method comprising determining for a first law firm client a first duration of time associated with financing an out-of-pocket cost for the first client and determining for a second law firm client a second duration of time associated with financing an out-of-pocket cost for the second client, wherein the first duration of time is different than the second duration of time; the law firm billing the first and second law firm clients a separate charge in relation to one or more respective out-of-pocket costs, wherein each charge is based in part on the duration of time determined...

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0014672487 *Drawing available*

WPI Acc no: 2005-020068/200502

Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-079609; 2005-541025

XRPX Acc No: N2005-017045

**Computerized method for payment of out-of-pocket cost to patent and trademark office, involves**

utilizing individual checking account to pay out-of-pocket costs incurred for client, while providing account utilization bill to client

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040236613	A1	20041125	US 1997898377	A	19970722	200502	B
			US 200122153	A	20011214		
			US 2004710483	A	20040714		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710483 A 20040714

Patent Details

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
US 20040236613	A1	EN	50	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

**Computerized method for payment of out-of-pocket cost to patent and trademark office, involves utilizing individual checking account to pay out-of-pocket costs incurred for client, while providing account utilization bill to client** **Original Titles:**Processing law firm out-of-pocket costs using a separate account **Alerting Abstract** ... **NOVELTY** - An individual checking account is used by a law firm to pay out-of-pocket costs incurred for client, while providing account utilization bill to client. **USE** - For payment of out-of-pocket cost for client to patent and trademark office such as patent cooperation treaty (PCT) international patent and trademark office, untitled states patent and trademark office (USPTO) and European patent office (EOP)... **ADVANTAGE** - Prevents fraud on the financing organization and enables the law firm to provide correct bill to its clients. Avoids the need of reconciliation of invoices and accounts, and software, thereby avoiding delay in providing bills... **DESCRIPTION OF DRAWINGS** - The figure shows an exemplary architecture of computerized system for payment of out-of-pocket cost to patent and trademark office. **Original Publication Data by Authority**Argentina**Publication No.** Inventor name & address:Lundberg, Steven... **Original Abstracts:**A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and trademark agency, or a foreign associate firm, where it is

cash against an account maintained by the separate organization. The firm bills the client for the fee, along with a ... firm for the fee and service charge is then sent to the separate organization to cover the firm's bill from the separate organization. A law firm maintains its own account and uses a second account funded with a loan to pay the out-of-pocket costs. **Claims:** 1. A method comprising: a law firm having at least one first account; the law firm using at least one second account with a financial institution to pay out-of-pocket costs incurred for clients of the law firm, wherein the second account is maintained specifically to pay out-of-pocket costs for clients of the law firm; and the law firm billing at least some of the law firm clients for costs associated with using the second account to pay out-of-pocket costs for the clients.

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DIALOG(R)File 350: Derwent WPTX

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0014649958 *Drawing available*

WPI Acc no: 2004-831977/200482

Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2005-020068; 2005-079609; 2005-541025

XRPX Acc No: N2004-657376

**Out-of-pocket cost payment apparatus for patent or trademark agency, determines separate charge for each out-of-pocket cost for client of law firm, based on cost associated with financing out-of-pocket costs**

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040225623	A1	20041111	US 1997898377	A	19970722	200482	B
			US 200122153	A	20011214		
			US 2004710558	A	20040720		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710558 A 20040720

Patent Details

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
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US 20040225623	A1	EN	50	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

**Out-of-pocket cost payment apparatus for patent or trademark agency, determines separate charge for each out-of-pocket cost for client of law firm, based on cost associated with financing out-of-pocket costs** **Original Titles:** Law firm accounting system and method for processing separate charges for out-of-pocket costs **Alerting Abstract ...NOVELTY** - The apparatus receives the data indicative of out-of-pocket costs for several clients of a law firm and determines a separate charge with respect to each out-of-pocket cost, based on a cost associated with financing the out-of-pocket... **USE** - For payment of out-of-pocket costs for clients of law firm, to patent or trademark agency e.g. United States patent and trademark office (USPTO), European patent office (EPO), and patent cooperation treaty (PCT) office, using standalone computer or computers connected through internet, public switched telephone network (PSTN)... **ADVANTAGE** - Eliminates the need for the law firm to provide its funds on behalf of its clients to pay the patent and trademark fees, thereby reducing the amount of working capital allotted towards patent and trademark fees... **Title Terms** .../Index Terms/Additional Words: **LAW; Class Codes** Original Publication Data by Authority/Argentina **Publication No.** Inventor name & address: **Lundberg, Steven...** **Original Abstracts:** A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. **The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and trademark agency, or a foreign associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the fee, along with a...** ...embodiment one or more computers programmed to receive data indicative of a plurality of out-of-pocket costs for one or more clients of a law firm and to **determine** a separate charge in relation to each respective out-of-pocket cost wherein the charge is determined at least in part based on a cost... **Claims:** comprising one or more computers programmed to receive data indicative of a plurality of out-of-pocket costs for one or more clients of a law firm and to **determine** a separate charge in relation to each respective out-of-pocket cost wherein the charge is determined at least in part based on a cost...

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0014649957 *Drawing available*

WPI Acc no: 2004-831976/200482

Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-

831975; 2004-831977; 2005-020068; 2005-079609; 2005-541025

XRPX Acc No: N2004-657375

**Out-of-pocket cost managing method in e.g. law firms, involves receiving finance from third party service providers for each of out-of-pocket cost incurred by the law firm for their clients**

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040225622	A1	20041111	US 1997898377	A	19970722	200482	B
			US 200122153	A	20011214		
			US 2004710556	A	20040720		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710556 A 20040720

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20040225622	A1	EN	20	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

**Out-of-pocket cost managing method in e.g. law firms, involves receiving finance from third party service providers for each of out-of-pocket cost incurred by the law firm for their clients**  
**Original Titles:**System and method for separate charges to a law firm for each out-of-pocket cost  
**Alerting Abstract** ...NOVELTY - Services are provided to a law firm by a service provider in relation to separate charges assessed for each of out-of-pocket cost incurred by the law firm for their clients, in which each separate charge relates to a cost associated with financing the respective out-of-pocket cost. ...USE - For law firms such as patent or trademark agency...  
...ADVANTAGE - Enables law firm to pay out-of-pocket cost for a client by getting financial assistance from third parties...  
...DESCRIPTION OF DRAWINGS - The figure shows a partial flowchart explaining method for managing out-of-pocket cost for law firms.  
**Title Terms** .../Index Terms/Additional Words: **LAW; Class Codes**  
**Original Publication Data by Authority**Argentina**Publication No.** Inventor name & address:**Lundberg, Steven... Original Abstracts:**A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or trademark agency, or a foreign associate firm, where it is

cash against an account maintained by the separate organization. The firm bills the client for the fee, along with a... firm for the fee and service charge is then sent to the separate organization to cover the firm's bill from the separate organization. A law firm maintains its own account and uses a second account funded with a loan to pay the out-of-pocket costs. According to one or more example embodiments of the inventive subject matter hereof, but not by limitation, there is provided method and apparatus providing for a third party to assist a law firm to pay a plurality of out-of-pocket costs for one or more clients, and the third party billing the law firm services rendered in connection with the separate charges. **Claims:** 1. A method comprising: a service provider providing services to a law firm in relation to separate charges assessed for each of a plurality of out-of-pocket costs incurred by the law firm for one or more clients of the law firm; and wherein each separate charge relates to a cost associated with financing the respective out-of-pocket cost incurred by the law firm.

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0014649956 *Drawing available*

WPI Acc no: 2004-831975/200482

Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-831976; 2004-831977; 2005-020068; 2005-079609; 2005-541025

XRPX Acc No: N2004-657374

Computerized fee payment method e.g. for paying patent fee, involves billing client with separate charge based on possible cost of financing loan to cover payment of patent fee, in addition to assessed actual charge

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040225621	A1	20041111	US 1997898377	A	19970722	200482	B
			US 200122153	A	20011214		
			US 2004710554	A	20040720		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710554 A 20040720

Patent Details



Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20040225621	A1	EN	50	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

**Original Titles:**Up front billing of interest costs to law firm clients with adjustment based on payment timing  
**Alerting Abstract** ...e.g. patent fee, in relation to the patent fee, in addition to the actual charge assessed based on when the client actually reimburses the law firm for the paid patent fee. USE - For payment of fees such as patent fee and trademark fee, of client by law firm... ADVANTAGE - Enables the law firm to cover the shortfalls created in advancement of foreign associate fees in addition to patent and trademark agency fees, reliably by billing special charge... Original Publication Data by AuthorityArgentinaPublication No. Inventor name & address:Lundberg, Steven.. **Original Abstracts:**A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and trademark agency, or a foreign associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the fee, along with a... without limitation, methods are provided to monitor or make payments for a plurality of out-of-pocket costs for one or more clients of a law firm, to generate a separate charge in relation to each respective out-of-pocket cost wherein each charge is based substantially on the cost of financing a loan or... **Claims:**1. A method comprising: a law firm arranging to pay a plurality of out-of-pocket costs for one or more clients; the law firm billing one of the clients a separate charge in relation to a particular respective out-of-pocket cost wherein the separate charge is based substantially on a possible... pay the out-of-pocket cost; and further wherein the actual charge assessed the client is substantially based on when the client actually reimburses the law firm for the out-of-pocket cost.

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0014649949 *Drawing available*  
WPI Acc no: 2004-831968/200482  
Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831903; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-079609; 2005-541025  
XRPX Acc No: N2004-657367

**Out-of-pocket cost managing apparatus for law firms, generates separate charge for each client's**

out-of-pocket cost as function of cost of financing loan to cover out-of-pocket cost payment

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040225607	A1	20041111	US 1997898377	A	19970722	200482	B
			US 200122153	A	20011214		
			US 2004710534	A	20040719		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710534 A 20040719

Patent Details

Patent Number	Kind	Lan	Pgs	Draw	Filing Notes	
US 20040225607	A1	EN	50	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153
					Continuation of patent	US 6363361

**Out-of-pocket cost managing apparatus for law firms, generates separate charge for each client's out-of-pocket cost as function of cost of financing loan to cover out-of-pocket cost...** **Original Titles:**System and method for up front billing of interest costs to law firm clients **Alerting Abstract** ...**NOVELTY** - The computer system receives data specifying payments for out-of-pocket costs of the law firms for their clients and generates a separate charge for each of the out-of-pocket cost. Each charge is substantially based on the cost....**USE** - For law firms such as patent or trademark agencies ...**ADVANTAGE** - Enables a law firm to pay out-of-pocket cost for a client through third party financing... **Title Terms** .../Index Terms/Additional Words: **LAW; Class Codes** Original Publication Data by Authority:Argentina**Publication** No. Inventor name & address:**Lundberg, Steven**... **Original Abstracts:**A computerized method and system for the payment of out-of-pocket fees such as patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and trademark agency, or a foreign associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the fee, along with a ... firm for the fee and service charge is then sent to the separate organization to cover the firm's bill from the separate organization. A law firm maintains its own account and uses a second account funded with a loan to pay the out-of-pocket costs. According to various example embodiments of the inventive... method and apparatus are provided to monitor or make payments for a plurality of

out-of-pocket costs for one or more clients of a **law** firm, to generate a separate charge in relation to each respective out-of-pocket cost wherein each charge is based substantially on the cost of financing a loan or...  
**Claims:** one or more computers programmed to receive data specifying payments for a plurality of out-of-pocket costs for one or more clients of a **law** firm and to **generate** a separate charge in relation to each respective out-of-pocket cost wherein each charge is determined at least in substantial part as a function...

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0014649884 *Drawing available*

WPI Acc no: 2004-831903/200482

Related WPI Acc No: 2002-424567; 2004-225326; 2004-448332; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-079609; 2005-541025

XRPX Acc No: N2004-657302

**Method for payment of out-of-pocket fees for client by law firm, involves billing separate charge related to out-of-pocket fees, to client by law firm, based time duration associated with financing of fees**

Patent Assignee: LUNDBERG S (LUND-I)

Inventor: LUNDBERG S

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040225517	A1	20041111	US 1997898377	A	19970722	200482	B
			US 200122153	A	20011214		
			US 2004710533	A	20040719		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 200122153 A 20011214; US 2004710533 A 20040719

Patent Details

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
US 20040225517	A1	EN	50	24	Continuation of application	US 1997898377
					Continuation of application	US 200122153

**Method for payment of out-of-pocket fees for client by law firm, involves billing separate charge related to out-of-pocket fees, to client by law firm, based time duration associated with financing of fees** **Alerting Abstract** ...associated with the financing of out-of-pocket fees related to different clients, are determined. A separate charge is billed for each client, by the **law firm**, based on the corresponding time duration. ...**USE** - For payment of out-of-pocket fees such as government patent and **trademark** agency/office fees, for client by **law firm**... ...**ADVANTAGE** - Enables the **law firm** to cover the shortfalls created in advancement of foreign associate fees in addition to patent and **trademark** agency fees, reliably by billing special charge... **Title Terms** .../Index Terms/Additional Words: **LAW**; **Class Codes** Original Publication Data by Authority **Argentina** **Publication No.**, Inventor name & address: **Lundberg, Steven**... **Original Abstracts**: A computerized method and system for the payment of out-of-pocket fees such as patent and **trademark** fees is disclosed. The patent or **trademark** fee for a **client** of a firm is charged against an account maintained by an organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and **trademark** agency, or a **foreign** associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the fee, along with a... ... firm for the fee and service charge is then sent to the separate organization to cover the firm's bill from the separate organization. A **law firm** maintains its **own** account and uses a second account funded with a loan to pay the out-of-pocket costs. According to one example embodiment of the inventive subject matter disclosed herein, there is disclosed a method and apparatus wherein a **law firm** client is **associated** with a first value, parameter, plan or schedule used to determine a charge to the client. The **law firm** bills the **law firm** client a **separate** charge in relation to one or more respective out-of-pocket costs, wherein each charge is based in part on the cost of processing or... **Claims**: 1. A method comprising determining for a first **law firm** client a **first** duration of time associated with financing an out-of-pocket cost for the first client and determining for a second **law firm** client a **second** duration of time associated with financing an out-of-pocket cost for the second client, wherein the first duration of time is different than the second duration of time; the **law firm** billing the **first** and second **law firm** clients a **separate** charge in relation to one or more respective out-of-pocket costs, wherein each charge is based in part on the duration of time determined...

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 DIALOG(R)File 350; Derwent WPIX  
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0014564456  
 WPI Acc no: 2004-746414/200473  
 XRPX Acc No: N2004-589615

**Internet-based system for management of patent and trademark application, notifies change in status of file wrapper unit, messaging unit, docketing unit, reference unit and notice unit of**

**enterprise platform to client**

Patent Assignee: LUNDBERG S W (LUND-I)

Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040199400	A1	20041007	US 2002433935	P	20021217	200473	B
			US 2002433944	P	20021217		
			US 2003741166	A	20031217		

Priority Applications (no., kind, date): US 2002433935 P 20021217; US 2002433944 P 20021217; US 2003741166 A 20031217

## Patent Details

Patent Number	Kind	Law	Pgs	Draw	Filing Notes	
US 20040199400	A1	EN	3	0	Related to Provisional	US 2002433935
					Related to Provisional	US 2002433944

**Internet-based system for management of patent and trademark application, notifies change in status of file wrapper unit, messaging unit, docketing unit, reference unit and notice unit of enterprise platform to client**  
**Original Titles:** Internet-based patent and trademark application management system  
**Alerting Abstract** ...**NOVELTY** - The law firm notifies the change in status of file wrapper unit, messaging unit, docketing unit, reference unit and notice unit of an enterprise platform to client.  
**USE** - Internet-based system for management of patent and trademark application related to disclosure meetings, attorney meetings and technical review board meetings...  
**ADVANTAGE** - Provides legal entity or client or other affiliate of legal entity access to management functions to facilitate legal proceedings.  
**Original Publication Data by Authority:** Argentina **Publication No.** Inventor name & address: Lundberg, Steven W..  
**Original Abstracts:** The present invention includes a system for a law firm to interact with clients, comprising: an enterprise platform that includes file wrapper means; messaging means; docketing means; reference means; and notice means wherein a law firm notifies the client of a change in status of one or more of file wrapper means, messaging means, docketing means, and reference means.  
**Claims:** 1. A system for a law firm to interact with clients, comprising: an enterprise platform that includes file wrapper means; messaging means; docketing means; reference means; and notice means wherein a law firm notifies the client of a change in status of one or more of file wrapper means, messaging means, docketing means, and reference means.

Dialog eLink: [Order File History](#)  
 3/3,K/19 (Item 19 from file: 350)  
 DIALOG(R)File 350: Derwent WPIX  
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0014262011 *Drawing available*

WPI Acc no: 2004-448332/200442

Related WPI Acc No: 2002-424567; 2004-225326; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-079609; 2005-541025

XRPX Acc No: N2004-354628

**On-line invoice management method for patent and trademark fee payment system, involves generating invoice containing identification information for client matter and requested foreign fee associated with matter for payment to vendor**

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040107153	A1	20040603	US 1997898377	A	19970722	200442	B
			US 2003640415	A	20030812		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 2003640415 A 20030812

Patent Details

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
US 20040107153	A1	EN	69	30	C-I-P of application	US 1997898377
					C-I-P of patent	US 6363361

**On-line invoice management method for patent and trademark fee payment system, involves generating invoice containing identification information for client matter and requested foreign fee associated with matter for payment to vendor** **Original Titles:**Computerized patent and trademark fee payment method and system **Alerting Abstract ...** invoice management system; and computerized system for payment of patent and trademark fees. ... USE - For on-line invoice management for computerized patent and trademark fee payment system (claimed);... ADVANTAGE - The patent or trademark fee for the client of the firm is charged against an account maintained by a financial organization separate from the firm... DESCRIPTION OF DRAWINGS -

The figure shows the flowchart explaining the patent and trademark fee payment method. Original Publication Data by Authority Argentina Publication No. Inventor name & address: Lundberg, Steven W... **Original Abstracts:** An improved computerized method and system for the payment of patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm includes foreign payables chargeable against an account maintained by an organization separate from the firm. The system includes a server coupled to ... teachings of the present invention, the method further includes using the fee computer system for adding a finance/processing charge that provides for allowing the law firm to pay for the foreign payable at a later date. Other aspects of methods and systems are also disclosed herein.

Dialog eLink: [Order File History](#)

3/3,K/20 (Item 20 from file: 350)

DIALOG(R)File 350: Derwent WPTX

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0014043120 *Drawing available*

WPI Acc no: 2004-225326/200421

Related WPI Acc No: 2002-424567; 2004-448332; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-079609; 2005-541025

XRPX Acc No: N2004-I78045

**Patent and trademark agency fees managing method, involves issuing funds to foreign associate in foreign associates native currency and billing associate funds and transaction fee in legal service providers native currency**

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 20040039668	A1	20040226	US 1997898377	A	19970722	200421	B
			US 1999418969	A	19991014		
			US 2003348784	A	20030122		

Priority Applications (no., kind, date): US 1997898377 A 19970722; US 1999418969 A 19991014; US 2003348784 A 20030122

Patent Details

Patent Number	Kind	Lang	Pgs	Draw	Filing Notes	
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US 20040039668	A1	EN	62	30	C-I-P of application	US 1997898377
					Continuation of application	US 1999418969
					C-I-P of patent	US 6363361

**Patent and trademark agency fees managing method**, involves issuing funds to foreign associate in foreign associates native currency and billing associate funds and transaction fee in legal service providers native currency **Original Titles:** Computerized patent and trademark fee payment method and system **Alerting Abstract ...NOVELTY** - The method involves receiving a request comprising a matter identification from a legal service provider and amount to be paid to a foreign associate. Funds in the foreign associates native currency are issued to the foreign associate. Bills for funds issued to the foreign associate and a transaction fee are provided to the legal service provider in the legal service providers native currency. **DESCRIPTION** - The foreign associates native currency is different from the legal service providers native currency. An **INDEPENDENT CLAIM** is also included for a computerized system for managing patent and trademark fees... **...USE** - Used for managing patent and trademark fees in a patent and trademark agency e.g. united states patent and trademark office... **...ADVANTAGE** - The funds are issued in foreign associates native currency and the bills for the funds and the transaction fee are issued in the legal service providers native currency, thereby efficiently processing the transaction between the servicer provider and the foreign associate... **...DESCRIPTION OF DRAWINGS** - The drawing shows a flowchart of a patent and trademark fees managing method. **Title Terms** .../Index Terms/Additional Words: **LEGAL**; **Class Codes** Original Publication Data by Authority Argentina **Publication No.** Inventor name & address: **Lundberg, Steven W...** **Original Abstracts:** An improved computerized method and system for the payment of patent and trademark fees is disclosed. The patent or trademark fee for a client of a firm includes foreign payables chargeable against an account maintained by an organization separate from the firm. The system includes a server coupled to... teachings of the present invention, the method further includes using the fee computer system for adding a finance/processing charge that provides for allowing the law firm to pay for the foreign payable at a later date. Other aspects of methods and systems are also disclosed herein. **Claims:** We claim: 1. A method for managing patent and trademark fees, comprising: receiving in a server from a networked terminal remote from the server a request from a legal service provider that payment be made to a foreign associate in the currency of the foreign associate, where the foreign associate's native currency is different from the legal service provider's native currency, and wherein the request comprises a matter identification from the legal service provider and an amount to be paid to the foreign associate: issuing funds to the foreign associate in the amount to be paid to the foreign associate in the foreign associate's native currency; and billing the legal service provider in the legal service provider's native currency for the funds issued to the foreign associate plus a transaction fee.

Dialog eLink: [Order File History](#)  
3/3.K/21 (Item 21 from file: 350)  
DIALOG(R):File 350: Derwent WPTX



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0012477798 *Drawing available*

WPI Acc no: 2002-424567/200245

Related WPI Acc No: 2004-225326; 2004-448332; 2004-831903; 2004-831968; 2004-831975; 2004-831976; 2004-831977; 2005-020068; 2005-079609; 2005-541025

XRFX Acc No: N2002-333760

**Computerized patent and trademark fee payment method involves using payment by client to firm for client invoice as funds for payment by firm to organization for firm invoice**

Patent Assignee: PATENT & TRADEMARK FEE MANAGEMENT LLC (PATE-N)

Inventor: LUNDBERG S W

Patent Family ( 1 patents, 1 countries )

Patent Number	Kind	Date	Application Number	Kind	Date	Update	Type
US 6363361	B1	20020326	US 1997898377	A	19970722	200245	B

Priority Applications (no., kind, date): US 1997898377 A 19970722

Patent Details

Patent Number	Kind	Law	Pgs	Draw	Filing Notes	
US 6363361	B1	EN	43	23		

**Computerized patent and trademark fee payment method involves using payment by client to firm for client invoice as funds for payment by firm to organization for firm invoice**  
**Original Titles:**Computerized patent and **trademark** fee payment method and system for **law** firms. **Alerting Abstract** DESCRIPTION - An INDEPENDENT CLAIM is also included for computerized patent and **trademark** fee payment system... ..USE - For managing computerized patent and **trademark** fee payment in **law** firms... ..ADVANTAGE - The firm has time to collect the payment of patent and **trademark** fees from its clients prior to repaying the finance organization. The organization provides services, since it is able to charge service charge passed along to the firm's clients. The organization is free to charge service charge for collecting payment of patent and **trademark** fees in conjunction with the loaning of money, since the organization is not a patent and **trademark** law firm... ..DESCRIPTION OF DRAWINGS - The figure shows the system architecture of computerized patent and **trademark** fee payment system... Original Publication Data by AuthorityArgentina**Publication No.** Inventor name & address:**Lundberg, Steven W...** **Original Abstracts:**A computerized method and system for the payment of patent and **trademark** fees is disclosed. The patent or **trademark** fee for a client of a firm is charged against an account maintained by an

organization separate from the firm. A charge issued at a workstation at the firm is delivered to a patent or patent and **trademark** agency, or a foreign associate firm, where it is cashed against an account maintained by the separate organization. The firm bills the client for the...

**Claims:**A computerized method for managing patent and **trademark** fees

**comprising:**inputting identification information for a matter of a client of a firm and a requested fee associated with the matter for payment to an agency as data representing the identification information into a computer system, wherein the agency comprises a patent or patent and **trademark** agency;issuing a **charge** for the requested fee at the computer workstation for transferral to the agency, the charge payable against an account maintained

### **III. Text Search Results from Dialog (Full Text dbs)**

#### **A. Full-Text Databases – PATENT**

**File 348:EUROPEAN PATENTS 1978-200939**

**(c) 2009 European Patent Office**

**File 349:PCT FULLTEXT 1979-2009/UB=20090917/UT=20090910**

**(c) 2009 WIPO/Thomson**

Set	Items	Description
S1	65417	(SEPARATE OR DISTINCT? OR UNRELATED OR THIRD()PARTY OR DIFFERENT OR NON()CLIENT OR OUTSIDE OR INDEPENDENT OR "NOT"(3W)CLIENT? OT T(2W)CLIENT? OR MIDDLEMAN(5N)(ORGANIZATION? ? OR ENTITY OR ENTITIES OR TRUSTEE? OR FIRM? ? OR COMPAN? ?? OR CORPORATION? OR LLC OR OUTFIT? ? OR AGENT)
S2	33291	(FEE? ? OR TARIFF? OR DISBURS? OR BILL? ? OR INVOICE? ? OR CHARGE? ?)
S3	10833	(MANAG? OR MAINTAIN? OR NAME? ?())ON OR DEDUCT? OR CONTROL? OR HANDL? OR ADMINISTER? OR OPERAT? OR BILL? ? )(4N)(ACCOUNT? OR FUND? ? OR TRANSFER? OR INVOIC? OR RETAINER? OR PAY? OR FUNDS OR BALANCE OR MONEY? ? OR RESERVE? OR POOL? OR DEPOSIT? OR ESCROW? OR DISBURS? OR BILL?)
S4	420	S1(12N)S3
S5	167	S4(7N)S2
S6	8	S5 NOT PY>1997
S7	12	S5(S)(PATENT? ?(3N)TRADEMARK? ? OR COPYRIGHT? OR INTELLECTUAL()PROPERTY?? OR IP)
S8	0	S7 NOT PY>1997
S9	25	S5(S)(GOVERNMENT OR STATE OR PROVINCE OR COUNTY OR OFFICIAL OR PUBLIC OR AGENCY)
S10	1	S9 NOT AY>1997
S11	1	S7 NOT AY>1997
S12	1	CIRCULAR()RETAINER?

6/3K/2 (Item 2 from file: 348)

DIALOG(R)File 348: EUROPEAN PATENTS

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00628301

#### **System for correlating RF usage in a trunked communication network.**

System zur Korrelierung des HF Gebrauchs in einem gebundenen Kommunikationsnetzwerk.

Systeme pour corréler l'usage radio dans un réseau a communications partagees.

#### **Patent Assignee:**

- Ericsson GE Mobile Communications Inc.;** (1318010)  
P.O. Box 4096, Mountain View Road; Lynchburg, Virginia 24502-9989; (US)  
(applicant designated states: DE;FR;GB;IT;SE)

#### **Inventor:**

- **Zdanowski, Thomas J.**  
106 Citation Lane; Lynchburg, Virginia 24503; (US)
- **Autry, George M.**  
8 Dogwood Place; Lynchburg, Virginia 24502; (US)

**Legal Representative:**

- **Mittler, Enrico et al (40772)**  
c/o Marchi & Mittler s.r.l. Viale Lombardia, 20; I-20131 Milano; (IT)

	Country	Number	Kind	Date	
Patent	EP	612191	A2	19940824	(Basic)
	EP	612191	A3	19940921	
Application	EP	94200345		19940216	
Priorities	US	20075		19930219	

**Designated States:**

DE; FR; GB; IT; SE;

**International Patent Class (V7):** H04Q-007/04; H04B-007/26; **Abstract Word Count:** 127

Legal Status	Type	Pub. Date	Kind	Text
--------------	------	-----------	------	------

**Language** Publication: English

Procedural: English

Application: English

Fulltext Availability	Available Text	Language	Update	Word Count
CLAIMS A		(English)	EPABF2	1346
SPEC A		(English)	EPABF2	6435
Total Word Count (Document A) 7781				
Total Word Count (Document B) 0				
Total Word Count (All Documents) 7781				

**Specification:** ...within a group can be individually billed. Moreover, the present invention adapts the CDRs so they may be read and processed by existing full featured **third party billing companies** to produce corresponding detailed **bills**.

While the invention has been described in connection with what is presently considered to be the most practical and preferred embodiments, it is to be...

**Dialog eLink:** [Order File History](#)

6/3K/4 (Item 4 from file: 348)

DIALOG(R)File 348: EUROPEAN PATENTS

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00220777

**System for centralized processing of accounting and payment functions.**

System zur zentralisierten Verarbeitung von Rechnungs- und Zahlungsfunktionen.

Système pour le traitement centralisé des fonctions de facturation et de paiement.

**Patent Assignee:**

- **PITNEY BOWES INC.;** (244950)  
One Elmcroft; Stamford Connecticut 06926-0790; (US)  
(applicant designated states: CH;DE;FR;GB;LI)

**Inventor:**

- **Sharpe, Murem S.**  
100 Farms Road; Stamford Connecticut; (US)
- **Manduley, Flavio M.**  
87 Old Grassy Hill Road; Woodbury Connecticut; (US)
- **Flessner, Brian D.**  
95 Grumman Avenue; Norwalk Connecticut; (US)
- **Bryson, Eugene A.**  
38 Pine Mountain Road; Redding Connecticut; (US)
- **Riodan II, Eben M.**  
159 Field Rock Road; Southport Connecticut; (US)

**Legal Representative:**

- **Cook, Anthony John et al (29551)**  
D. YOUNG & CO. 10, Staple Inn; London, WC1V 7RD; (GB)

	Country	Number	Kind	Date	
Patent	EP	209392	A2	19870121	(Basic)
	EP	209392	A3	19880720	
	EP	209392	B1	19920520	
Application	EP	86305535		19860718	
Priorities	US	756420		19850718	

**Designated States:**

CH; DE; FR; GB; LI;

**International Patent Class (V7):** G06F-015/22; ; **Abstract Word Count:** 188

Legal Status	Type	Pub. Date	Kind	Text
--------------	------	-----------	------	------

**Language** Publication: English

Procedural: English

Application: English

Fulltext Availability	Available Text	Language	Update	Word Count
CLAIMS B		(English)	EPBBF1	612
CLAIMS B		(German)	EPBBF1	604
CLAIMS B		(French)	EPBBF1	649
SPEC B		(English)	EPBBF1	6113
Total Word Count (Document A) 0				
Total Word Count (Document B) 7978				
Total Word Count (All Documents) 7978				

**Specification:** ...arrange and schedule shipments for shippers are known. Such agents and forwarders also receive freight bills from carriers and pass them on to shippers.

A **company** doing business as Numerex, Inc. provides a **third party service** for auditing freight **bills**. Essentially, Numerex provides a third party **Accounts Payable** Department. **Such** third party **Accounts Payable** services have also been provided by banks. Numerex is also believed to provide a computerized third party Rating service.

Those skilled in the art...

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**Dialog eLink:** [Order File History](#)

6/3K/6 (Item 2 from file: 349)

DIALOG(R)File 349: PCT FULLTEXT

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00305859

**COMPUTER SYSTEM FOR MANAGING PATIENT CARE**  
**SYSTEME DE GESTION INFORMATIQUE DE SOINS MEDICAUX**

**Patent Applicant/Patent Assignee:**

- **MEDICAL DIMENSIONS INC**

**Inventor(s):**

- **CHRISTOPHER Kent L**
- **BECKER Barron D**

	Country	Number	Kind	Date
Patent	WO	9524010	A1	19950908
Application	WO	95US2598		19950302
Priorities	US	94131		19940304

**Designated States:** (Protection type is "Patent" unless otherwise stated - for applications prior to 2004)

AM, AT, AU, BB, BG, BR, BY, CA, CH, CN,  
 CZ, DE, DK, EE, ES, FI, GB, GE, HU, JP,  
 KE, KG, KP, KR, KZ, LK, LR, LT, LU, LV,  
 MD, MG, MN, MW, MX, NL, NO, NZ, PL, PT,  
 RO, RU, SD, SE, SG, SI, SK, TJ, TT, UA,  
 UG, UZ, VN, KE, MW, SD, SZ, UG, AT, BE,  
 CH, DE, DK, ES, FR, GB, GR, IE, IT, LU,  
 MC, NL, PT, SE, BF, BJ, CF, CG, CI, CM,  
 GA, GN, ML, MR, NE, SN, TD, TG

**Language** Publication Language: English

Filing Language:

Fulltext word count: 6341

**Detailed Description:**

...For reimbursement purposes, these charges are tagged with their appropriate CPT codes. This helps the physician and office staff to minimize overlooked, incomplete, or improper **charges**. The standard **superbill** format facilitates **transfer** of this information to **outside** billing **companies** or insurance carriers.

The present system is typically implemented as a series of tables in a relational database (e.g., FoxPro marketed by Microsoft Corporation...

?

## B. Full-Text Databases – NON-PATENT

**File 15:ABI/Inform(R) 1971-2009/Sep 24**  
(c) 2009 ProQuest Info&Learning  
**File 9:Business & Industry(R) Jul/1994-2009/Sep 24**  
(c) 2009 Gale/Cengage  
**File 610:Business Wire 1999-2009/Sep 25**  
(c) 2009 Business Wire.  
**File 810:Business Wire 1986-1999/Feb 28**  
(c) 1999 Business Wire  
**File 275:Gale Group Computer DB(TM) 1983-2009/Aug 26**  
(c) 2009 Gale/Cengage  
**File 624:McGraw-Hill Publications 1985-2009/Sep 25**  
(c) 2009 McGraw-Hill Co. Inc  
**File 621:Gale Group New Prod.Annou.(R) 1985-2009/Aug 18**  
(c) 2009 Gale/Cengage  
**File 636:Gale Group Newsletter DB(TM) 1987-2009/Sep 01**  
(c) 2009 Gale/Cengage  
**File 613:PR Newswire 1999-2009/Sep 25**  
(c) 2009 PR Newswire Association Inc  
**File 813:PR Newswire 1987-1999/Apr 30**  
(c) 1999 PR Newswire Association Inc  
**File 16:Gale Group PROMT(R) 1990-2009/Sep 01**  
(c) 2009 Gale/Cengage  
**File 160:Gale Group PROMT(R) 1972-1989**  
(c) 1999 The Gale Group  
**File 634:San Jose Mercury Jun 1985-2009/Sep 20**  
(c) 2009 San Jose Mercury News  
**File 148:Gale Group Trade & Industry DB 1976-2009/Sep 08**  
(c) 2009 Gale/Cengage  
**File 20:Dialog Global Reporter 1997-2009/Sep 25**  
(c) 2009 Dialog

Set	Items	Description
S1	3444879	(SEPARATE OR DISTINCT? OR UNRELATED OR THIRD()PARTY OR DIFFERENT OR NON()CLIENT OR OUTSIDE OR INDEPENDENT OR "NOT"(3W)CLIENT? OT T(2W)CLIENT? OR MIDDLEMAN) (5N)(ORGANIZATION? ? OR ENTITY OR ENTITIES OR TRUSTEE? OR FIRM? ? OR COMPAN?? OR CORPORATION? OR LLC OR OUTFIT? ? OR AGENT)
S2	59085	(FEE? ? OR TARIFF? OR DISBURS? OR BILL? ? OR INVOICE? ? OR CHARGE? ?) (12N)S1
S3	25997	(MANAG? OR MAINTAIN? OR NAME? ?()ON OR DEDUCT? OR CONTROL? OR HANDL? OR ADMINISTER? OR OPERAT? OR BILL? ? ) (4N)(ACCOUNT? OR FUND? ? OR TRANSFER? OR INVOIC? OR RETAINER? OR PAY? OR FUNDS OR BALANCE OR MONEY? ? OR RESERVE? OR POOL? OR DEPOSIT? OR ESCROW? OR DISBURS? OR BILL?)
S4	12465	S1(12N)S3



S5 12211 S4(5N)S2  
 S6 2457 S5 NOT PY>1997  
 S7 2054 RD (unique items)  
 S8 20 S7(12N)(PATENT? ? OR TRADEMARK? ? OR COPYRIGHT? OR  
 INTELLECTUAL()PROPERTY?? OR IP)  
 S9 118 7(12N) (LAWFIRM? OR (LAW OR LEGAL)())(FIRM? ? OR OUTFIT? ? OR TEAM?  
 OR CORPORATION?) OR ATTORNEYS OR ATTORNEY)  
 S10 0 CIRCULAR()RETAINER?  
 S11 0 S9 AND S8  
 S12 237 S7(12N)(GOVERNMENT OR STATE OR PROVINCE OR COUNTY OR OFFICIAL OR  
 PUBLIC OR AGENCY)  
 S13 1 S12 AND S9  
 S14 307 (PATENT? ? OR TRADEMARK? ? OR COPYRIGHT? OR INTELLECTUAL()PROPERTY??  
 OR IP) (8N)S2  
 S15 96 S14(S)S3  
 S16 94 S15(20N)S1  
 S17 68 RD (unique items)  
 S18 24 S16 NOT PY>1997  
 S19 23 S17 NOT PY>1997  
 S20 4 S19 NOT S8

#### **IV. Text Search Results from Dialog (Abstract dbs)**

##### **A. Abstract Databases -- Patent**

**File 347:JAPIO Dec 1976-2009/Jun(Updated 090923)**

**(c) 2009 JPO & JAPIO**

**File 350:Derwent WPIX 1963-2009/UD=200960**

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Set	Items	Description
S1	22007	(SEPARATE OR DISTINCT? OR UNRELATED OR THIRD()PARTY OR DIFFERENT OR NON()CLIENT OR OUTSIDE OR INDEPENDENT OR "NOT"(3W)CLIENT? OT T(2W)CLIENT? OR MIDDLEMAN) (5N)(ORGANIZATION? ? OR ENTITY OR ENTITIES OR TRUSTEE? OR FIRM? ? OR COMPAN??? OR CORPORATION? OR LLC OR OUTFIT? ? OR AGENT)
S2	927760	(FEE? ? OR TARIFF? OR DISBURS? OR BILL? ? OR INVOICE? ? OR CHARGE? ?)
S3	146	S1(7N)S2
S4	767	(MANAG? OR MAINTAIN? OR NAME? ?())ON OR DEDUCT? OR CONTROL? OR HANDL? OR ADMINISTER? OR OPERAT? OR BILL? ? ) (4N)(ACCOUNT? OR FUND? ? OR TRANSFER? OR INVOIC? OR RETAINER? OR PAY? OR FUNDS OR BALANCE OR MONEY? ? OR RESERVE? OR POOL? OR DEPOSIT? OR ESCROW? OR DISBURS? OR BILL?)
S5	32	S4(S)S3
S6	3	S5 NOT AY>1997
S7	3	IDPAT (sorted in duplicate/non-duplicate order)
S8	3	IDPAT (primary/non-duplicate records only)
S9	2	S8 AND (PATENT? ?(3N)TRADEMARK? ? OR COPYRIGHT? OR INTELLECTUAL()PROPERT??? OR IP)
S10	0	CIRCULAR()RETAINER?

## B. Abstract Databases – NON-PATENT

File 35:Dissertation Abs Online 1861-2009/Aug  
 (c) 2009 ProQuest Info&Learning  
 File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13  
 (c) 2002 Gale/Cengage  
 File 65:Inside Conferences 1993-2009/Sep 25  
 (c) 2009 BLDSC all rts. reserv.  
 File 2:INSPEC 1898-2009/Sep W3  
 (c) 2009 The IET  
 File 474:New York Times Abs 1969-2009/Sep 25  
 (c) 2009 The New York Times  
 File 475:Wall Street Journal Abs 1973-2009/Sep 25  
 (c) 2009 The New York Times  
 File 99:Wilson Appl. Sci & Tech Abs 1983-2009/Aug  
 (c) 2009 The HW Wilson Co.  
 File 256:TecTrends 1982-2009/Sep W3  
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Set	Items	Description
S1	43656	(SEPARATE OR DISTINCT? OR UNRELATED OR THIRD()PARTY OR DIFFERENT OR NON()CLIENT OR OUTSIDE OR INDEPENDENT OR "NOT"(3W)CLIENT? OT T(2W)CLIENT? OR MIDDLEMAN) (5N)(ORGANIZATION? ? OR ENTITY OR ENTITIES OR TRUSTEE? OR FIRM? ? OR COMPAN??? OR CORPORATION? OR LLC OR OUTFIT? ? OR AGENT)
S2	2281	(FEE? ? OR TARIFF? OR DISBURS? OR BILL? ? OR INVOICE? ? OR CHARGE? ?)
S3	1554	(MANAG? OR MAINTAIN? OR NAME? ?())ON OR DEDUCT? OR CONTROL? OR HANDL? OR ADMINISTER? OR OPERAT? OR BILL? ? ) (4N)(ACCOUNT? OR FUND? ? OR TRANSFER? OR INVOIC? OR RETAINER? OR PAY? OR FUNDS OR BALANCE OR MONEY? ? OR RESERVE? OR POOL? OR DEPOSIT? OR ESCROW? OR DISBURS? OR BILL?)
S4	611	S1(12N)S2
S5	124	S4(5N)S3
S6	69	S5 NOT FY>1997
S7	68	RD (unique items)
S8	1	S7(S)(PATENT? ?(3N)TRADEMARK? ? OR COPYRIGHT? OR INTELLECTUAL()PROPERTY??? OR IP)
S9	18	S7(S)(GOVERNMENT OR STATE OR PROVINCE OR COUNTY OR OFFICIAL OR PUBLIC OR AGENCY)
S10	49	S7 NOT (S8 OR S9)
S11	5	S10 AND (LAWFIRM? OR (LAW OR LEGAL)())(FIRM? ? OR OUTFIT? ? OR TEAM? OR CORPORATION?) OR ATTORNEYS OR ATTORNEY)
S12	44	S10 NOT S11
S13	0	CIRCULAR()RETAINER? ?

11/3,K/2 (Item 1 from file: 475)  
 DIALOG(R)File 475: Wall Street Journal Abs

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07015100

**PACTEL'S LEGAL TEAM HAD BETTER GET READY FOR SOME COMPETITION**

Wall Street Journal , Col. 1 , Pg. 8 , Sec. B

Monday July 24 1995

**PACTEL'S LEGAL TEAM HAD BETTER GET READY FOR SOME COMPETITION**

**Abstract:**

**Lawyers and Clients column discusses new pressures on in-house legal teams at some companies; notes that Pacific Telesis Group, in a move to make its in-house legal team competitive with outside law firms, has formed a separate subsidiary that will sell legal services; the legal unit will produce bills for its 'clients,' other PacTel subsidiaries; drawing (M)**

## **V. Additional Resources Searched**

No additional results of relevance found in the additional databases identified in the coverage page correspondence.